

Financial Services Technologies

Financial Services (FIN)

The Financial Services degree program prepares students for a wide range of career opportunities in the fast-paced, dynamic financial services industry, which includes banking, investments, and insurance. Students develop core skills in business management and technology along with an emphasis on personal financial planning. Cooperative education employment provides valuable business skills and experience. Graduates earn an Associate of Applied Business degree.

Financial Planning Certificate (FPC)

The Financial Planning Certificate prepares graduates to develop comprehensive financial plans for clients by applying knowledge and skills in a variety of personal financial planning areas, including taxes, investments, insurance, and retirement and estate planning. The certificate program is designed for individuals with a bachelor's degree in any field who want to provide professional financial planning services.

For more information, please contact the Business Technologies Division at (513) 569-1620.

Financial Services Technology (FIN)

Semester 1		Lec	Lab	Credits
ACC 101	Financial Accounting (B)	2	2	3
ENG 101	English Composition 1 (G)	3	0	3
FIN 100	Personal Finance (B)	3	0	3
LAW 101	Business Law (B)	3	0	3
FYE 1XX First Year Experience Elective (B)		1	0	1
MAT XXX Mathematics Elective (G)		3	0	3
Semester 2				
ACC 102	Managerial Accounting (T)	2	2	3
ACC 175	Federal Taxation: Individuals (T)	3	0	3
BUS 190	Professional Practices (B)	1	0	1
FIN 120	Risk and Insurance (T)	3	0	3
IM 120	Electronic Spreadsheets: Microsoft Excel (B)	2	3	3
ENG 10X English Composition Elective (G)		3	0	3
Semester 3				
FIN 291	Full-Time Cooperative Education 1: Finance (T)	1	40	2
Semester 4				
ECO 105	Principles of Microeconomics (G)	3	0	3
FIN 150	Business Finance (T)	3	0	3
FIN 175	Retirement and Employee Benefit Planning (T)	3	0	3
FIN 185	Estate Planning (T)	3	0	3
Semester 5				
FIN 292	Full-Time Cooperative Education 2: Finance (T)	1	40	2
FIN 200	Investments (T)	3	0	3
Semester 6				
FIN 290	Financial Planning Capstone (T)	3	0	3
COMM 1XX Communication Elective (B)		3	0	3

MKT XXX Marketing Elective (B)			3
XXX XXX Arts/Humanities Elective or Natural/Physical Science Elective (G)	3	0	3
Total Credits:	55	87	63

Electives

First Year Experience Elective

FYE 100	College Survival Skills	1
FYE 105	College Success Strategies	2
FYE 110	Community College Experience	3

Mathematics Elective

MAT 115	Pre-Statistics	3
MAT 131	Statistics 1	3
MAT 132	Statistics 2	3
MAT 151	College Algebra	4
MAT 215	Business Calculus	6
MAT 251	Calculus 1	5
MAT 252	Calculus 2	5

English Composition Elective

ENG 102	English Composition 2: Contemporary Issues	3
ENG 103	English Composition 2: Writing about Literature	3
ENG 104	English Composition 2: Technical Communication	3
ENG 105	English Composition 2: Business Communication	3

Communication Elective

COMM 105	Interpersonal Communication	3
COMM 110	Public Speaking	3

Marketing Elective

MKT 101	Principles of Marketing	3
MKT 110	Sales and Customer Relations	3
MKT 130	Professional Selling	3

Arts/Humanities Elective or Natural/Physical Science Elective (select one course)

Any Transfer Module course from ART, LIT, MUS, PHI, REL, THE, or COMM 130 or, any Transfer Module course from BIO, CHE, EVS, PHY, PSC			3
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Financial Planning Certificate (FPC)

Semester 1		Lec	Lab	Credits
FIN 100	Personal Finance	3	0	3
ACC 175	Federal Taxation: Individuals	3	0	3
FIN 120	Risk and Insurance	3	0	3
Semester 2				
FIN 175	Retirement and Employee Benefit Planning	3	0	3
FIN 185	Estate Planning	3	0	3
FIN 200	Investments	3	0	3
Semester 3				
FIN 290	Financial Planning Capstone	3	0	3
Total Credits:		21	0	21

Faculty

Program Chair

Margaret Clark, MBA, CFP
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Co-op Coordinator

Maya Franklin, MS
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Courses

FIN 100 Personal Finance

3 Credits. 3 Lecture Hours. 0 Lab Hour.

A course on coordinated and realistic personal financial planning. Topics include: budgeting and tax planning, managing liquidity, personal loans, purchasing cars and homes, insurance and investing principles, and retirement and estate planning.

Prerequisites: None

FIN 120 Risk and Insurance

3 Credits. 3 Lecture Hours. 0 Lab Hour.

A course on principles of risk management and insurance for enterprises and individuals. Topics include: fundamentals of life, health, property, and liability insurance; and enterprise risk management for businesses.

Prerequisites: None

FIN 150 Business Finance

3 Credits. 3 Lecture Hours. 0 Lab Hour.

A course on principles of financing business firms. Topics include: financial statement analysis, time value of money, management of cash flow, risk and return, and short and long-term sources of financing.

Prerequisites: ACC 101

FIN 175 Retirement and Employee Benefit Planning

3 Credits. 3 Lecture Hours. 0 Lab Hour.

A course on developing retirement plans and employee benefit plans. Topics include: legislation that affects plan design; tax advantages and disadvantages of various retirement plans; and Social Security, Medicare, and employer-sponsored health and welfare plans.

Prerequisites: FIN 100

FIN 185 Estate Planning

3 Credits. 3 Lecture Hours. 0 Lab Hour.

A course on techniques for taxation avoidance or minimization used in planning a client's estate. Topics include: wills, trusts, gifting, titling of accounts, the probate process, and taxation of estates.

Prerequisites: FIN 100

FIN 191 Part-Time Cooperative Education 1: Finance

1 Credit. 1 Lecture Hour. 20 Lab Hours.

Students seeking an associate's degree participate in their first part-time field learning experience related to their degree. Students are expected to register for academic courses during the same semester. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: BUS 190

FIN 192 Part-Time Cooperative Education 2: Finance

1 Credit. 1 Lecture Hour. 20 Lab Hours.

Students seeking an associate's degree participate in their second part-time field learning experience related to their degree. Students are expected to register for academic courses during the same semester. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: FIN 191

FIN 193 Part-Time Cooperative Education 3: Finance

1 Credit. 1 Lecture Hour. 20 Lab Hours.

Students seeking an associate's degree participate in their third part-time field learning experience related to their degree. Students are expected to register for academic courses during the same semester. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: FIN 192

FIN 194 Part-Time Cooperative Education 4: Finance**1 Credit. 1 Lecture Hour. 20 Lab Hours.**

Students seeking an associate's degree participate in their fourth part-time field learning experience related to their degree. Students are expected to register for academic courses during the same semester. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: FIN 193

FIN 195 Part-Time Cooperative Education 5: Finance**1 Credit. 1 Lecture Hour. 20 Lab Hours.**

Students seeking an associate's degree participate in their fifth part-time field learning experience related to their degree. Students are expected to register for academic courses during the same semester. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: FIN 194

FIN 196 Part-Time Cooperative Education 6: Finance**1 Credit. 1 Lecture Hour. 20 Lab Hours.**

Students seeking an associate's degree participate in their sixth part-time field learning experience related to their degree. Students are expected to register for academic courses during the same semester. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: FIN 195

FIN 198 First Year Special Topics in Finance**1-9 Credits. 0 Lecture Hour. 0 Lab Hour.**

A course on selected topics related to Finance, which gives students opportunities to study information not currently covered in other courses. Grades issued are A, B, C, D, or F.

Prerequisites: Vary by section

FIN 199 First Year Independent Project in Finance**1-9 Credits. 0 Lecture Hour. 0 Lab Hour.**

A project related to Finance that is completed by one or more students to meet specific educational goals. Projects must have prior approval and supervision by Finance faculty. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: Vary by section

FIN 200 Investments**3 Credits. 3 Lecture Hours. 0 Lab Hour.**

A course on securities and the markets in which they are traded, and sources of financial information. Topics include: features and characteristics of financial instruments such as money market instruments, stocks, bonds, international securities, options, and futures contracts.

Prerequisites: FIN 150

FIN 290 Financial Planning Capstone**3 Credits. 3 Lecture Hours. 0 Lab Hour.**

Students apply knowledge and skills gained through the Financial Services degree or Financial Planning Certificate by analyzing case studies and creating a comprehensive financial plan.

Prerequisites: FIN 120, FIN 175, ACC 175, FIN 200

FIN 291 Full-Time Cooperative Education 1: Finance**2 Credits. 1 Lecture Hour. 40 Lab Hours.**

Students seeking an associate's degree participate in their first full-time field learning experience related to their degree. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: BUS 190

FIN 292 Full-Time Cooperative Education 2: Finance**2 Credits. 1 Lecture Hour. 40 Lab Hours.**

Students seeking an associate's degree participate in their second full-time field learning experience related to their degree. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: FIN 291

FIN 293 Full-Time Cooperative Education 3: Finance**2 Credits. 1 Lecture Hour. 40 Lab Hours.**

Students seeking an associate's degree participate in their third full-time field learning experience related to their degree. Students must follow cooperative education policies and procedures to earn credit. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: FIN 292

FIN 298 Second Year Special Topics in Finance**1-9 Credits. 0 Lecture Hour. 0 Lab Hour.**

A course on selected topics related to Finance, which gives students opportunities to study information not currently covered in other courses. Grades issued are A, B, C, D, or F.

Prerequisites: Vary by section

FIN 299 Second Year Independent Project in Finance

1-9 Credits. 0 Lecture Hour. 0 Lab Hour.

A project related to Finance that is completed by one or more students to meet specific educational goals. Projects must have prior approval and supervision by Finance faculty. Grades issued are Satisfactory or Unsatisfactory.

Prerequisites: Vary by section